

May 1, 2008

TO: Cari Trussell
Employee Relations Specialist
Washington Public Employees Association (WPEA)

FROM: Teresa Parsons
Director's Review Program Supervisor

SUBJECT: Candace Alvarez v. Olympic College (OC)
Allocation Review Request ALLO-07-046

On April 8, 2008, I conducted a Director's review meeting at the Department of Personnel, 2828 Capitol Boulevard, Olympia, Washington, concerning the allocation of Ms. Alvarez's position. Present at the Director's review meeting were you, Ms. Alvarez, and Human Resource Consultant Jacquie Curry from Olympic College. Randall Lawrence, Vice President of Instruction, and Gloria Martin, Director of Instructional Support Services, participated by telephone conference call. At the time of Ms. Alvarez's request for a position review at Olympic College, Ms. Martin was her second-line supervisor.

Background

On February 2, 2007, Ms. Alvarez submitted a Position Questionnaire (PQ) to Olympic College's Human Resources (HR) Office, requesting that her Program Assistant position be reallocated to the Program Coordinator classification. By memorandum dated April 30, 2007, Ms. Curry determined that the majority of Ms. Alvarez's duties and responsibilities fit the Program Assistant classification.

On June 14, 2007, the Department of Personnel received your letter, on behalf of Ms. Alvarez, requesting a Director's review of Olympic College's allocation determination.

On March 19, 2008, I sent a letter to you and Ms. Curry addressing the timeliness of Ms. Alvarez's request. By letter dated March 24, 2008, you responded to the issue of timeliness by indicating that the allocation determination was hand-delivered to Ms.

Alvarez on May 15, 2007, which was supported by an email chain on that date. Olympic College did not dispute that Ms. Alvarez was handed the determination on May 15, 2007. Therefore, I concluded Ms. Alvarez's request for a Director's review was in fact timely filed.

Summary of Ms. Alvarez's Perspective

Ms. Alvarez asserts that she coordinates the specialized and technical functions related to scheduling all spaces, including classrooms, conference rooms, ITV classrooms, theater, faculty offices, and other facility areas, for three campuses. Ms. Alvarez further asserts that she tracks, maintains, and coordinates the use of all inventory items, such as furniture, equipment, and teaching stations for four quarterly class schedules, maintaining room use and inventory in a facility management database. Ms. Alvarez asserts that as the primary contact for facility requests, all requests for space filter through her. As such, Ms. Alvarez states that she coordinates with campus office/unit functions, such as Facilities Maintenance, Media Services, Theater, Campus Security, and Center for Information Services (CIS). Ms. Alvarez states she also coordinates with outside organizations and other colleges or state agencies using campus facilities.

Ms. Alvarez contends she is the administrator for the automated room scheduler and has extensive involvement with students, faculty, staff, administrators, and the public regarding room scheduling and inventory operation. In her role, Ms. Alvarez states that she provides information about facility policies, procedures, and rental rates, and that she recommends alternative courses of action when facilities are unavailable or do not meet a customer's needs. Ms. Alvarez asserts she uses her knowledge and experience of facility spaces, including square footage and room design, and instructional support services to independently advise customers about options and alternatives for scheduling space. Because the campuses are often close to full capacity, Ms. Alvarez contends she negotiates with faculty and staff and applies college priorities to reassign or change room requests.

Ms. Alvarez contends that she exercises independent judgment in interpreting and applying rules and regulations, including Board of Trustees approved facilities policies, rates, rental procedures, and other issues related to facilities requests. With that understanding, Ms. Alvarez asserts she either assigns a budget code for college departments or invoices outside agencies and has the authority to recognize if and when community partners may receive a discounted price for services. Ms. Alvarez states she also tracks and monitors invoices for payment and ensures special assignments, such as added custodians for special events or theater light/sound technicians, are paid. Ms. Alvarez believes the scope and responsibility assigned to her position far exceed the Program Assistant classification.

Summary of OC's Reasoning

While OC agrees that Ms. Alvarez coordinates arrangements for program activities, OC contends her position does not have responsibility for coordinating the operation of the program. OC describes Ms. Alvarez's role as the primary contact for the Instructional Support Services office and for scheduling matters. OC acknowledges that tasks related to room scheduling increased from one campus to three; however, OC asserts the added volume of work has not changed the scope of the duties performed. OC asserts that Ms. Alvarez performs scheduling duties and makes arrangements for room rentals according to an established policy that is straight forward. In the course of scheduling, OC contends that Ms. Alvarez provides customer service to facility users and clerical support for the Instructional Support Services program, including obtaining the necessary documentation, coordinating the use of and ordering equipment or services from other departments, such as Media Services, and billing by charging budget codes to other college departments. In addition to scheduling, OC states that Ms. Alvarez's duties involve generating reports, tracking inventory, and calculating and billing outside agencies for facility usage.

At the time of this position review request at OC, Ms. Curry met with Ms. Alvarez and her supervisor at the time, Program Support Supervisor II Pamela Borne. Based on the assignment of work to Ms. Alvarez's position, OC believes the largest portion of duties involve customer service relating to scheduling rooms and coordinating various accommodations. In addition, OC asserts the level of decision-making assigned to Ms. Alvarez's position is within the scope of the Program Assistant, which involves interpreting policies and procedures and coordinating budget functions. OC asserts Ms. Alvarez processes paperwork, for example, to ensure payment. OC further asserts Ms. Alvarez enters information into a database with regard to inventory tracking or facility space assignments. While OC considered the Building Coordinator classifications, the college determined the Program Assistant was the appropriate fit. OC recognizes Ms. Alvarez's contributions to the Instructional Support Services program and acknowledges the room scheduling process grew when it became centralized. However, OC contends the majority of Ms. Alvarez's duties and the scope of responsibility fit the Program Assistant classification.

Director's Determination

This position review was based on the work performed for the six-month period prior to December 7, 2006, the date Ms. Alvarez submitted her reallocation request with Olympic College.

As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review meeting, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Alvarez's assigned

duties and responsibilities, I conclude her position should be reallocated to the Program Coordinator classification.

Rationale for Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

In reviewing the majority of Ms. Alvarez's work assignments, I considered her description of duties on the PQ; Part III of the PQ, which was completed by her supervisor at the time, Program Support Supervisor II, Pamela Borne; and the Position Description Form (PDF) signed by Ms. Alvarez, Ms. Borne, and Ms. Martin on June 2, 2005. In Part III of the PQ, Ms. Borne indicated that the assignment of work listed on the PQ was also indicated on the June 2005 PDF. Ms. Alvarez's position can be summarized as follows:

The position serves as the primary contact for facility and room scheduling. The duties include coordinating room assignments for four quarterly class schedules, campus office/unit functions, and coordinating facility requests to include calculating and billing rental charges in accordance with policies and procedures. The position performs records and database management and technical support for the scheduling function with an emphasis on instructional use spaces.

When performing her assigned duties, Ms. Alvarez exercises independent judgment, interprets and applies policies and procedures, and has extensive involvement with program participants, which may include college staff, faculty, and outside parties. Ms. Alvarez also performs extensive coordination with other college departments, ranging from Campus Security to Media Services to ensure facility users have the adequate space needed for a particular instructional setting or event. Additionally, Ms. Alvarez coordinates quarterly room assignments on campus. During the Director's review conference, Ms. Martin confirmed the coordination often requires a good deal of negotiation due to room availability issues.

The PDF indicates the majority of Ms. Alvarez's assigned work involves the above duties. In the section identified as 88%, the PDF indicates Ms. Alvarez's position serves as the primary contact for rental procedures and rate information regarding facility requests; the primary technical contact for preparation and data entry for all facility

transactions entered in the automated room scheduler; and that she coordinates room assignments for quarterly class schedules and facility requests; and writes reports, makes adjustments, and compiles and distributes weekly reports showing rooms scheduled beyond the class schedule.

The types of duties Ms. Alvarez describes on the PQ are consistent with those on the PDF. However, the PQ provides greater detail regarding Ms. Alvarez's level of responsibility. For example, the PQ indicates that Ms. Alvarez recommends alternative courses of action when available facilities do not meet customer needs. Ms. Alvarez's supervisor, Ms. Bourne agreed with Ms. Alvarez's characterization of duties and also confirmed that she delegated to Ms. Alvarez the authority to coordinate facility operations with campus units and divisions to execute detailed facility requests and determine alternate courses of action.

As part of her duties (5%), the PDF indicates Ms. Alvarez coordinates complex coding and data entry to maintain and update the facilities inventory database, and she performs annual facilities inventory in conjunction with the state MIS-3 Facilities Inventory reporting timeline. During the Director's review conference, Ms. Alvarez explained that she tracked data on inventory and room use by entering new building information in the system, making adjustments, measuring and determining square footage, and making changes to blueprints when necessary. She also codes all classrooms, conference rooms, offices, and other locations in the system.

During the Director's review conference, Ms. Alvarez explained that she collects and maintains building information, which may involve taking one building out of the system and setting up new building information or measuring classrooms. Ms. Alvarez then explained that she runs reports from the data she enters in the program. With the computer program she can also scale blueprints or determine classroom capacity, which she agreed could also be determined by the number of seats available in any given area. Ms. Alvarez indicated that the inventory and room use tracking duties are more than 5% of her work.

However, after reviewing all of the documentation, I conclude the majority of Ms. Alvarez's assigned work deals with facility scheduling and the coordination of all related functions. This is a complex process that involves extensive coordination and communication with college staff, faculty, administrators and outside agencies.

In considering the various classifications, I determined the scope of Ms. Alvarez's duties fit the program class concept.

The Department of Personnel Glossary of classification terms defines a program as:

A specialized area, which has specific complex components and discrete tasks that distinguish it from other programs (or the main body of an organization). A program is specific to a particular subject and has a

specific mission, goals, and objectives. A program typically has an identifiable funding source and separate budget code.

The specific components and discrete, specialized tasks involve interpretation of policies, procedures and regulations, budget coordination/administration, independent functioning, and typically, public contact relating specifically to program subject matter, clients and participants.

Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks. Independent performance of the specialized tasks usually requires a training period of not less than six months.

Instructional Support Services meets the definition of a program. The class series concept for the program classifications states:

Perform work requiring knowledge and experience that is specific to a program. Organize and perform work related to program operations independent of the daily administrative office needs of the supervisor.
Represent the program to clients, participants and/or members of the public.

Ms. Alvarez's position fits within the class series concept for the program classifications.

The basic function for the Program Assistant states that positions "[p]erform specialized technical/clerical duties in support of a program activity. The distinguishing characteristics indicate the following:

Under general supervision, perform work requiring knowledge and experience specific to the program. Provide students, staff, program participants and/or the public with information and interpretation of policies and activities related to the program specialty. Compose written communications, and establish and maintain records relating to program operations.

The basic function for the Program Coordinator classification states that positions "[c]oordinate the operation of a specialized or technical program." The Washington State Glossary of Classification Terms defines coordinate as independently organizing, monitoring, evaluating, and making adjustments for a program or activity without supervisory responsibility over program or activity participants.

The distinguishing characteristics of a Program Coordinator include the following:

Under general direction, perform work using knowledge and experience specific to the program. Exercise independent judgment in interpreting and applying rules and regulations. Independently advise students, staff, program participants and/or the public regarding program content, policies, procedures and activities; select/recommend alternative courses of action and either:

- Project, monitor, maintain, initiate and/or approve expenditures on program budgets

OR

- Have extensive involvement with students, staff, the public and/or agencies in carrying out program activities, and coordinate, schedule and monitor program activities to determine consistency with program goals.

Ms. Alvarez not only performs specialized duties in support of Instructional Support Services, she has extensive involvement in coordinating the scheduling functions, which tie into providing instructional support through the use of classrooms, other facilities, services, and equipment. In that capacity, Ms. Alvarez works with other college departments and has extensive involvement with staff, faculty, administrators and others to ensure classes and events have the proper location and any equipment needed. Ms. Alvarez's level of responsibility exceeds the level of a Program Assistant.

While examples of work do not form the basis for an allocation, they lend support to the work envisioned within a classification. The typical work examples of the Program Coordinator classification most in line with Ms. Alvarez's assigned duties include the following:

Within the specialized program:

- Provide information and advice to students, staff, program participants and/or the public regarding program content, policies and activities, recommend alternative courses of action; promote the program on campus with outside organizations;
- Attend meetings and/or conferences as program representative;
- Confer regularly with representatives of off-campus organizations and agencies regarding the interpretation and implementation of program and institutional policies;

- Monitor program activities in relation to established program goals; within established program parameters, determine variance from program standards;
- Direct the work of others;
- May make public presentations related to program specialty.

Although I considered the Building Coordinator 2 classification, which involves coordinating the day-to-day scheduling and use of on-site buildings, rooms, and facilities, I determined the scope of Ms. Alvarez's position also required extensive involvement with college departments and faculty with regard to instructional support services.

While I recognize that a portion of Ms. Alvarez's job involves facility room and inventory tracking through the use of the MIS database, I do not find that the majority her assigned responsibilities fit the level and scope envisioned in the Space Analyst 1 classification. The Space Analyst 1 definition states that positions "maintain current room and building space inventory for all campus facilities; prepare classroom and laboratory utilization data and coordinate the updating of reference plans." The distinguishing characteristics note that positions "perform prescribed procedure in space utilization data collection and application in space programs."

The focus of positions in the Space Analyst I class include maintaining space inventory, assigning and classifying rooms, determining classroom capacities, departmental assignments, and preparing classroom rosters. During the Director's review conference, Ms. Alvarez indicated she did not prepare classroom rosters or assign specific departmental locations. Instead, she indicated that the various departments made those types of decisions. Ms. Alvarez works in the Instructional Support Services program and at the time of this request, she reported to a Program Support Supervisor II position. While Ms. Alvarez may collect, enter, adjust, and report on inventory and facilities space information, her position has not been assigned the scope or level of decision-making authority of the Space Analyst I class.

I realize this has been a lengthy process, and if Ms. Alvarez believes the level of her assigned duties and responsibilities have changed, she may request a review of her current duties and responsibilities in accordance with the appropriate collective bargaining agreement. However, based on the overall assignment of duties and the scope and level of responsibility assigned to Ms. Alvarez's position during the time relevant to this review, the Program Coordinator classification best describes her position.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

c: Candace Alvarez
Jacquie Curry, OC

Enclosure: List of Exhibits